

Luma Budget Quick Reference Guide (QRG)

Compensation Adjustment Budget Form (5700)

Compensation Adjustment Budget Form (5700)

Initiator: Any budget employee

Reason: To record compensation adjustments in the 10 series.

General Notes:

- This Form is used to note any “other” compensation adjustments in the 10 series:
 - **10.65:** Public Schools
 - **10.66:** Military Compensation (adjustments)
 - **10.67:** Compensation Schedule Changes
 - **10.68:** Other CEC Adjustments
 - **10.69:** CEC Fund Shifts
- The information in this form will become part of the “Personnel Cost Forecasting (PCF)” report.
- This is one of many budget forms in the system that provides information to the PCF report. They are the following:
 - Line Item & Supplemental Requests (5100)
 - DU 8 Series Transfer (5600)
 - Vacant & Other PC Adjustments (6300)
 - Salary & Benefit Changes (6200)
 - Position Allocation (8100)
- These forms will complete the Personnel Costs (PC) values, which upload to the PCF report.

Create a Parent Entry:

1. Select form 5700 from the form dropdown menu to open the form’s summary overview screen.
 - This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.
2. Click **Add New** to open the “Create a new Budget Form – 5700” screen.

Compensation Adjustments (5700)

Quick Search:
Enter search criteria here... [Show Advanced Filters](#)

Record Actions:
[Add New](#)

Form ID	Name	Stage	Agency	DU	Form Rows	Last Update	Last User	Submit	Actions
There are no records available.									

Records per page: 50

Records: 0 - Page: 1

3. Fill in mandatory fields:
 - a. **Stage:** Not all budget forms start in Stage 1.
 - b. **Agency:** Agencies you have permission to access will appear in the field's lookup tool.
 - c. **Decision Unit (DU):** Click the magnifying glass and select an option
 - See listings above.
4. Click **Save** to continue to the "Budget Form Header" screen.

Create a new Budget Form - 5700

Close

Stage:* 5701 - Initial Entry

Agency:*

Decision Unit:*

Save Cancel

HEADER TAB

- The "Budget Form Header" tab is where request reporting narratives are entered and Decision Unit (DU) detail settings are established.
 1. **Name:** A brief descriptive title of the transfer for future reference. Once saved, the name will appear at the top of the form and the summary overview screen.
 2. **Explanation to show on the Detail Report:** The text in this field will appear on the "Budget Detail" report and can be edited as necessary. Please keep these explanations brief.

Budget Form Header

Instance ID	Form Definition	Definition Name	Agency
3224	5700	Compensation Adjustments (5700)	150

Stage Code:* Agency Decision Unit:
Initial Entry State Treasurer Other CEC Adjustme

Name:*

Explanation to show on Detail Report:

Analyst's Comments:

- Once you are satisfied with these fields, click **Save** and navigate to the “Details” tab to access the “Budget Form Lines” screen.

DETAIL TAB

- Create lines to build transactional data, providing totals for the parent entry.
 - On a Budget Form Header screen, select the “Detail” tab to open the “Budget Form Lines” screen.
 - Create and edit lines:

Budget Form Lines

ID	Form	Agency	DU	Form Name	Total Amount
10363	5300	999 - Test Agency (System)	08.61 - Base Additions / Restorations	5. Mixed Use DU Entry (5300)	\$0

Quick Search:

Actions:

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	FTP Amounts*	Amount*	Comments / Notes
There are no records available.											

Records per page:

Records: 0 - 0 of 0 - Pages:

- Add New:** This button will open the “Add New Line” utility, allowing the user to manually enter a new form line.

- **Copy:** This button allows users to copy a highlighted form line, saving time and effort when new lines share previously created form line details.
- **Export/Import:** Click **Export** to pull the template and any existing line information. Modify the form in Excel and save it before clicking **Import** to upload your changes.

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Comments / Notes
1		SCAA	10000	0	0	

Records per page: 50

Records: 1 - 1 of 1 - Pages: 1

- **Pencil Edit:** Clicking the pencil icon at the end of a form line will allow the user to make quick edits to form line fields (e.g. Amount, FTP, etc.). 
- **Lookup (Magnifying Glass):** Opens a contextual search utility that displays all available options for the field.
- **Comments/Notes:** Utilize this field to make notes and add additional information about a given form line as needed.

Budget Form Entry - Add New Line

Page Actions: [Close](#)

Form ID	Form Definition
10366	5700

Approp:*
 Fund:*
 DU:* Public Schor
 Program: Not Assigned
 Project: Not Assigned
 OG / OT:* On-Going

Account:* Personnel
 Org Unit: Not Assigned
 [Save](#) [Cancel](#)

Comments / Notes:

Amount* : **Audit Text:**

- **Approp:** Select the appropriation unit (AU) applied to this line
- **Fund:** Select the applicable fund number for this line
- **Program (optional):** Select a program associated with the line if your agency enters its budget with that level of detail.

- **Project** (optional): Select a project associated with the line if your agency enters its budget with that level of detail.
- **OG/OT**: Designates if the line is on-going (OG) or one-time (OT).
- **Account**: Defaults to “50”, the Account Category for PC.
- **Org Unit** (optional): Select an organizational unit associated with the line if your agency enters its budget with that level of detail.

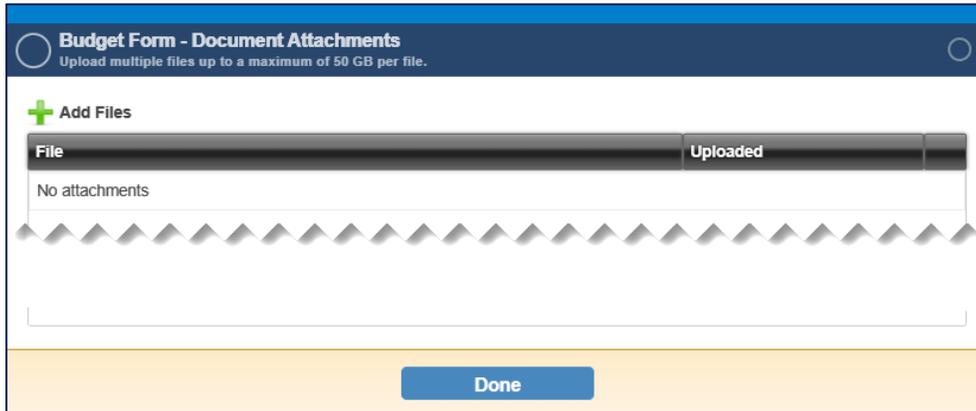
The screenshot shows a form with the following fields:

- Comments / Notes:** A large text input field.
- FTP Amounts*:** A numeric input field with the value 0.
- Amount*:** A numeric input field with the value 0.
- Audit Text:** Two separate text input fields stacked vertically.

- **Comments/Notes** (optional): Specific notes can be added to this field.
 - **FTP Transfers**: This allows for the reporting on any relevant Full-Time Positions.
 - **Transfer Amount**: Enter the dollar amount for the line.
 - **Audit Text**: Comment fields, visible only on the form line audit history screen.
3. Once changes are made, click **Save All** and **Refresh** on the screen.
 4. Review the information for accuracy.

ATTACHMENT TAB

Selecting the “Attachment” tab will open the “Budget Form – Document Attachments” utility. Clicking **Add Files** will open a file explorer dialogue, allowing you to locate and select the document(s) you would like to upload to the form.



Note: You may upload multiple documents at once as long as they do not exceed the 50 GB file limit.

Result: You successfully reported your “other” compensation adjustments.

Additional training resources can be found on the SCO website’s Luma Budget Training page: <https://www.sco.idaho.gov/LivePages/luma-budget-support-and-training.aspx>

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